

Monitor Account Conversion

verview

Who: SBS Support

What: Load an Excel template into Salesforce using Data Loader. To complete this process, GBU data steward must give:

- *Salesforce ID of the user to add*
- *Salesforce ID of the accounts*
- *Team member role*
- *Access to accounts : Read OR write*

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identifies the Step-by-step

1	Open excel file provided by Aurelia Bouvry . This file identifies, side by side, the records ID of SAP (sold-to code) " Customer " and CRM ID " APP_L_CUST_ID "
2	Open this SFDC Report and download data in excel file (This report contains data on Account conversion to monitor)
3	From this Excel file, focus on column L : "SAP Number"

1. the column is empty : this means the SAP creation has been cancelled and the record type should be modified from "Account Creation Record type" to "Account record type"

Account Detail Edit Delete Manage External Account

▼ **Account Information**

Account Owner	Isabelle Lindemann [Change]	Account Record Type	Account Creation Record Type [Change]
Account Name	Airbus Espana S. L. [View Hierarchy]	CTD Rep	Andrea Rapetti
Account Name (Local Language)		SDM Resp.	
Parent Account	AIRBUS - PARENT ACCOUNT	SAP Code	
Account Site	Getafe - Madrid	Phone	+34 916 242 322
CSR Region	Europe (Bollate - Aromatics)	Fax	
		Email	
		Website	
		Region	Europe

Account Record Type Change

Airbus Espana S. L.

Use this page to change the record type for this account.

When changing the record type for a record, existing picklist values do not change automatically. Existing picklist values on the record where appropriate.

Select New Record Type

Transfer this Account Airbus Espana S. L.

Current Record Type Account Creation Record Type

New Record Type

Continue Cancel

Account Edit

Airbus Espana S. L.

Account Edit Save Save & New Cancel

Account Information

Account Name

Account Owner Isabelle Lindemann

Account Name (Local Language)

Parent Account

Create SAP Account

Type

Sub Type

Account Detail Edit Delete Sharing Manage External Account Send Engage

▼ **Account Information**

SKA		Account Group	
Account Name	Airbus Espana S. L. [View Hierarchy]	Account Record Type	Account Record Type [Change]
Account Owner	Isabelle Lindemann [Change]	CTD Rep	Andrea Rapetti
Account Name (Local Language)		SDM Resp.	
Parent Account	AIRBUS - PARENT ACCOUNT	Phone	+34 916 242 322
Create SAP Account	<input checked="" type="checkbox"/>	Fax	
Type	Customer	Email	
Sub Type	OEM	Website	
		Region	Europe
		CSR Region	Europe (Bollate - Aromatics)
		Account Site	Getafe - Madrid

Done !

2. we have a number ex 4022221 (leading zeroes can be ignored)

SAP account?	Group	SAP number	Opened Dat	Account
Just Created	8. Sold-Ship-Bill	0002126283	29/03/2018	Mantis C
Already Exists	8. Sold-Ship-Bill	0001033481	7/06/2018	TEIJIN CAI
2). Already Exists	7. Prospect (Sold-Ship)	0002104882	4/06/2018	Western I
Just Created	8. Sold-Ship-Bill	0004022221	3/06/2018	Ying Chin

a. Search 4022221 in Aurelia excel file (col B "Customer")

i. not found :

The screenshot shows an Excel spreadsheet with columns: External applicati, Customer, APPL. CUST ID, Name, and Group. The data includes various CRM-SSP records. A 'Find and Replace' dialog box is open, showing 'Find what: 4022221'. A speech bubble points to the search results area with the text '4022221 not found'. A second dialog box from Microsoft Excel states 'Microsoft Excel cannot find the data you're searching for.' with an 'OK' button.

Email Aurelia and suggest record creation in corresponding table **if relevant** (provide SAP Code + "18D 18D Account ID" in first col of [SFDC Report](#))

ii. found 422221 : check CRM ID

1. CRM ID valid : Compare CRM in Aurelia table and SFDC report
 - a. CRM ID identical : wait one more day
 - b. CRM ID different
 - i. merge CRM accounts if relevant
 - ii. convert from "Account Creation Record Type" into "Account Record type" (see above 3 1.)
2. CRM not valid : track the typos and suggest the combination SAP ID - Account ID to Aurelia

typical exemples of typos are

 - a. 0
 - b. OO1SolvayDental
 - c.
 - d. lower case vs uppercase in CRM ID
 - e. N/A
 - f. XXXXXXXXXXXXXXXX

Related articles

Can't find information?

Related docs

- [Web support contact](#)